

## Use Matching Gifts to Stretch Your Fundraising Budget

We all know the old saying that it takes money to make money. But as a fundraiser, you also know that it also takes time, staff, resources, and the buy-in of your stakeholders.

In today's economy, though, all of those things are at a premium. Nonprofits are facing shrinking endowments, declining grant funding, and greater hesitancy from donors who are focused on their own financial headaches. At the same time, fundraising budgets and staffing are being slashed to save money. Fundraisers are caught between the proverbial rock and a hard place.

HEP Development can help. Our research staff is dedicated to providing development officers with the finest matching gift data available in the U.S. and Canada. We use the latest web tools and techniques such as sophisticated web crawlers to continually search for new and updated policies, companies, and matching gift forms. Our clients can be confident that they have access to the most current data available.

Our comprehensive GiftPlus® database is updated 30 to 40 times per day, 24/7. In fact, over the last three years our research staff have added almost 650 net-new companies to the database – over 200 this year alone. That means more opportunities to find matching gift eligible donors and associated revenues. We also have a Canadian database of nearly 3,000 matching gift companies and subsidiaries – a HEP exclusive.



GiftPlus® powers an impressive array of powerful tools that streamline your entire matching gift campaign – before, during, and after. HEP Development's cutting-edge EmployerFind™ technology finds employer information and match-eligible donors for you. Our innovative MatchMyGift™ turns smartphones into valuable matching gift search tools for major gift officers and volunteers. Our exclusive E-Match Donor Link™ matching gift lookup form can be embedded on your

website's donation form and throughout your entire site, allowing donors to determine their match eligibility immediately. We offer integration with the most popular software vendors to allow for both downloading and uploading of current data, and we also integrate with the most popular phonathon software.

Once you have had a chance to read this white paper and think about the ideas and case studies discussed in it, I encourage you to contact us for a free consultation. You can also join the discussion on CASE's MATCHLIST-L listserv, watch free archived webinars on our website's Learning Center, and download free publications from our website as well.

For many development officers, matching gifts are the secret weapon in their fundraising arsenal. How about at your institution?

– Steve Hafner  
Founder and CEO  
HEP Development

# Cost-Effective Matching Gift Resources from HEP Development

A single-site multi-user Web subscription to our entire file of more than 15,000 matching gift companies and subsidiaries. Updated daily, Gift Plus Online provides detailed match policy information and allows users to create custom match reminders for donors in hard copy or via e-mail.

**Gift PLUS Online**<sup>®</sup>

Find out more at [www.hepdata.com/giftsub.cfm](http://www.hepdata.com/giftsub.cfm)

A customized link on your giving page that allows online donors to quickly search HEP's comprehensive GiftPlus<sup>®</sup> database to instantly verify the match eligibility of their gift and download match forms – right from your giving page. By making your donor an active participant, you'll increase your matching gift revenue.

**E-Match Donor Link**

Find out more at [www.hepdata.com/ematch.cfm](http://www.hepdata.com/ematch.cfm)

A proprietary web crawling technology that uses sophisticated algorithms to scour publicly available information, locating employer data that's missing from your databases. EmployerFind<sup>™</sup> can also identify match-eligible Board members, senior executives, CEOs, and SVPs. Hit rates range from 15% to 40%.

**hep employer find**<sup>™</sup>

Find out more at [www.hepdata.com/empappend.cfm](http://www.hepdata.com/empappend.cfm)

An electronic screening service that identifies match-eligible donors by processing employment information against HEP's comprehensive GiftPlus<sup>®</sup> database of corporate matching gift programs. Increase constituent and corporate support with an average 4-12% find rate.

**AutoMatch**<sup>®</sup>

Find out more at [www.hepdata.com/giftplus1.cfm](http://www.hepdata.com/giftplus1.cfm)

The most complete file of opt-in cell phone numbers in the industry. HEP's companion Wireless Flag service identifies cell phone numbers in your database, which allows you to customize your campaign's calling strategy for maximum impact.

**hep cell phone find**<sup>™</sup>

Find out more at [www.hepdata.com/phone\\_empappend.cfm](http://www.hepdata.com/phone_empappend.cfm)

The MatchMyGift<sup>®</sup> app for iPhone, Android, and Blackberry provides front-line fundraisers with quick and easy access to HEP Development's comprehensive GiftPlus<sup>®</sup> database right from their smart phone. Use it to determine match eligibility on the spot and even email matching gift forms to prospects!

**2x MatchMyGift**<sup>®</sup>

Find out more at [www.hepdata.com/matchmygift.cfm](http://www.hepdata.com/matchmygift.cfm)

# How to Use Matching Gifts to Stretch Your Fundraising Budget

These practical, real-world tips and techniques from veteran fundraisers are sure to help you boost your matching gift revenue. Try them out on your next fundraising campaign!

## Before Your Campaign:

Before you begin your campaign, you'll need to collect and analyze key data that will help you bolster your fundraising case:

- **Matching gift performance.** How did match revenue boost your last campaign?
- **Top donors and prospects.** Who are you planning to approach, and why?
- **Institutions with match programs.** Which companies hire your donors and match gifts?

You'll save time in the long run if you ensure that your database is up to date. A screening will ensure that biographical data, employment status, and contact information are all current. Make sure you have the latest information on employer matching gift programs at the businesses where your donors and prospects work. That includes access to current employee match forms, company guidelines on the programs they support, and limitations such as match ceilings and ratios.

Marketing is crucial to a successful matching gift campaign. Target a broad range of constituents using proven techniques such as buckslip mailers, postcards, phone calls, articles in publications, and strategically placed advertisements. Cross-pollinate your marketing by partnering with other fundraisers, especially telefund and major gift officers. And of course, enlist the services of your institution's public affairs office too.

## During Your Campaign:

Once the campaign launches, your primary focus should be on ensuring that all components are running smoothly. While monitoring the campaign, focus on making sure the donor actually takes action by filling out the matching gift application and getting it in the mail to you. Follow up as needed by e-mail and phone. You can overcome reluctance by making the application process as simple as possible. As responses come in throughout the campaign, update your database with the information they contain.

## After Your Campaign:

Following the conclusion of the campaign comes the all-important gift administration process, including processing the gift from the match company. Find out what their schedule for disbursing match funds is in advance.

Always acknowledge and recognize the gifts you receive in a prompt and appreciative manner. Donor retention and renewal is hard, but with proper recognition your attrition rates will be much lower.

Finally, remember that nothing succeeds like success. The more successful you are at generating matching gift revenue, the more attention and cooperation your program will get – and the stronger the case you can make the next time you are preparing to launch a fundraising campaign!

HEP Development has a wide array of tools that you can use to boost the results of your matching gift campaign at every step of the way – before, during, and after!

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### HEP Development

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## Case Studies

### California Polytechnic State University San Luis Obispo, California

**The Challenge:** Cal Poly's Advancement Office needed to find creative and effective ways to boost matching gift revenue by 6% annually without expending its limited budget or overtaxing its small staff.

**The Solution:** The office uses a variety of cost-effective outreach techniques that drive donors to a matching gift webpage powered by HEP Development's **E-Match Donor Link™** to quickly find out whether their employers match gifts to Cal Poly – and if so, to get quick and easy access to their company's match application forms. The **E-Match Donor Link™** search form matches the design of the Cal Poly website, providing donors with a seamless and intuitive search experience.

**The Numbers:** For the past four years, matching gift revenue has increased annually from 12% to 24% – **that's 200% to 400% more than Cal Poly's annual goal!**

### World Vision Federal Way, Washington

**The Challenge:** Humanitarian organization World Vision needed to identify the strongest prospects for an innovative integrated marketing program targeting match-eligible donors.

**The Solution:** World Vision conducted a pilot test screening of 100,000 donors through **EmployerFind™**, consisting of a direct-mail and outbound call campaign targeting 801 match-eligible donors identified in the screening. In addition, World Vision tweaked its print and e-mail solicitations and acknowledgments, web ads, brochures, and mailings to drive donors to the organization's matching gift page, powered by **E-Match Donor Link™**.

**The Numbers:** Around 12% of the targeted donors made matching gifts to the organization – **generating approximately \$80,000 in revenue in one year.** Thanks in part to HEP Development's tools, World Vision's match revenue has increased steadily over the past several years, **from just under \$1.74 million to \$7 million!**

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## Case Studies

### Brigham Young University (LDSP) Provo, Utah

**The Challenge:** LDS Philanthropies, which is responsible for philanthropic donations to BYU, wanted to use social media to boost alumni giving via matching gifts. For a pilot campaign with alumni at 10 companies, they opted for a corporate agent widget that could be posted on blogs and Facebook pages. But how to handle the match transaction?

**The Solution:** LDS Philanthropies decided to power their new widget with HEP Development's **E-Match Donor Link™**, which allowed prospects to quickly search HEP's comprehensive **GiftPlus®** database to find out whether their employers matched gifts to LDS Philanthropies – without ever having to leave the widget.

**The Numbers:** After the initial 1,800 alumni spread the widget to 6,500 of their relatives and friends, the campaign raised \$35,000 – or **a total of \$70,000 after the match!**

### University of Texas at Austin Austin, Texas

**The Challenge:** The Development Office at the University of Texas at Austin needed a better way to keep tabs on the match eligibility of alumni as they moved, received promotions, and changed careers.

**The Solution:** Four times a year, the UT Austin Development Office sends its donor lists to HEP Development to be processed by HEP Development's **AutoMatch®** electronic screening service, which screens the lists against HEP's comprehensive **GiftPlus®** database of corporate matching gift programs. With 30-40 changes made daily and new companies added all the time, **GiftPlus®** ensures that UT Austin gets the most up-to-date donor information possible.

**The Numbers:** According to the UT Austin Development Office staff, **the revenue generated from just a handful of matches is sufficient to cover the costs of the match screening!**

HEP Development enables fundraisers to improve donor engagement through wealth identification and monitoring, matching gift identification and promotion, and address/phone/email/employer appending. With more than 5,000 customers and 17 years' experience, HEP has developed proven tools to help nonprofits raise more money, more efficiently.



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